

**From:** [Bob J Shelton](#)  
**To:** [Sharon](#)  
**Cc:** [Paula Brown](#); [Judy Brown](#)  
**Subject:** Re: Forms from NY Life re Trust  
**Date:** Tuesday, March 19, 2019 4:08:00 PM

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Sharon,

NY Life is interfering with the administration of the Trust. The only beneficiary of the annuity is the Trust as amended and restated. I have already filed for the proceeds of the annuities as the Trustee of the Trust.

If you have any questions or comments let me know.

Bob J. Shelton, President  
Bob J. Shelton, P.C.  
5103 Chad Dr.  
Arlington, Texas 76017  
Phone # 817-654-0277  
Cell # 817-929-7277  
Fax # 817-338-1051

On Sunday, March 17, 2019, 6:44:01 PM CDT, Sharon <mrs.sharon.britton@gmail.com> wrote:

Hi Bob,

NY Life sent a forms packet to me which consists of:

Letter addressed to: Barbara Jean Brown Family Trust, to my address,

regarding Annuitant: Barbara Jean Brown, Policy: 74739460, Claim No.: 606747, Beneficiary: Barbara Jean Brown Family Trust dated March 9, 1998 Second Restatement March 12, 2010,

which states, "To proceed with this claim, please submit the following:

Death Benefit Proceeds form completed by the trustee with the trust information including the trust's TIN and signed by the trustee.

Copy of the title, signature, and notary pages of the trust, including pages showing the trustee and successor trustee as well as any applicable amendments.

Confirmation of Trust completed by the trustee with the trust information.

IRS Form W-9 completed with the trust information including the trust's TIN and signed by the trustee.

Forms packet named NY Life Claim Kit for Individual Life Insurance and Annuity Death Proceeds which includes the following forms.

Instructions to complete Death Benefit Proceeds Form

Payment Options for Death Benefit Proceeds and Settlement Alternatives

Tax Withholding (for Annuities Only)

Death Benefit Proceeds Form, 2 pages or front and back

HIPAA Compliant Authorization

Medical Information and Insurance

Confirmation of Trust

Prepaid Return Envelope addressed to: NY Life and Annuity Corporation

Death Benefit Proceeds Administration

PO Box 130539

Dallas, TX 75313-0539

I would scan these and email to you but my computer is going to repair shop tomorrow. We just moved back to our house last week after living in the motel for a month after the tree fell on our house. The computer was working fine when we left but now will not display on the monitor. I'm thinking and hoping it is only a video card. We are still putting our house in order from the repair requiring furniture and article removal from the damaged area so my time for other things are severely limited. Hope you can get the forms direct from NY Life or possible online at their website.

The letter is signed by Mary Beth Duirk, Customer Service Claims  
Customer Service Phone 800-695-9873

I have a few concerns and questions but I will get back in touch whenever things are more normal.

Sincerely,

Sharon Brown Britton  
Beneficiary